



TODD.MOSER@NORTHROCKPARTNERS.COM
847.620.5551

Todd Moser,

CFP[®], CPWA[®], BFA[™]

Lead Advisor, Personal Office[®], and Partner

Integrating over 19 years of private wealth management advisory experience, Todd is responsible for driving strategic growth and implementing the Personal Office[®] experience for his clients. A member of the full-service NorthRock Partners Chicago team, Todd supports Fortune 500 corporate executives nationwide as well as partnering with entrepreneurs and families to help them achieve their personal and financial goals.

The Chicago office was founded by Thomas Moser and Bill Kearns with a simple mission to help improve the quality of clients' lives by helping them live with financial dignity. This legacy remains at the core of Todd's client relationships today as he focuses on understanding each client's values, priorities and goals to help them make aligned decisions from a place of understanding and clarity.

Todd is a graduate of Augustana College, where he earned his degree in business administration, finance and economics. Well-recognized by industry publications, he has been named to top-advisors lists including Forbes Best-in-State Wealth Advisors for 2018-2019 and Barron's Top 1,200 Financial Advisors lists for 2018-2019.

Todd and his wife, Christina, live in Palatine, Illinois, with their four children. He cherishes spending time with family and enjoys supporting their many activities as both a coach and a fan. An avid outdoorsman, you can often find Todd mountain biking, snowboarding, fly fishing for smallies, boating, kayaking and hiking at the lake or running and biking around town.

PROFESSIONAL DESIGNATIONS AND ASSOCIATIONS

- ✓ Bachelor of Science, Business Administration (Finance) and Economics, Augustana College
- ✓ Certified Financial Planner[™] Professional (CFP[®])
- ✓ Certified Private Wealth Advisor (CPWA[®])
- ✓ Behavioral Financial Advisor (BFA[™])

PROFESSIONAL AND COMMUNITY INVOLVEMENT

- ✓ Member of Investment Management Consultants Association
- ✓ Board Member of Children's Heart Foundation
- ✓ Ronald McDonald House Charities
- ✓ Max McGraw Wildlife Foundation
- ✓ Thomas A. Moser, CFP[®] Scholarship Fund